# Departmental Refund

Complete this form to refund money to a department or individual when funds already received will not be used.

## 1. Access Mountaineer Marketplace:
- Log in at myaccess.wvu.edu
- Click the MyTools tab
- Click the Mountaineer Marketplace button

## 2. In the list of PCPS Automated Forms on the Mountaineer Marketplace Home page, click **Departmental Refund** to open the form.

## 3. Locate the individual (or company) that is due a refund:
1. Click **Supplier Search** to find the individual.
2. If the individual is not listed, click **Supplier Request**. After the individual has been registered as a supplier, you can return to this form.
4. Complete all fields in the Payment Information region.
   - **Product Description**: a description of the refund purpose.
   - **Supplier Inv #**: the invoice number from the supplier-provided invoice.
     - If the invoice does not contain a number, create one using 0463 (the agency number given to WVU by the State Auditor’s Office) plus the invoice date in the MMDDYY format. If there is no invoice date, the date the invoice was received by WVU shall be used.

   **Example for invoice with date of July 31, 2016**: 0463073116
   - **Invoice Date** and **Goods Recd Date**: The date you complete the form
   - **Amount**: The total amount of the refund.

5. At the top of the form, view choices in the **Available Actions** region in the upper right corner. Choose **Add Item and Close Form**. Click **Go**.

6. A shopping cart has been created that contains this form. You may click either:
   - **Proceed to Checkout** (go to step 7)
   - **or Assign Cart**: (go to step 6).

**Note**: If you do not know the account number that will pay for the refund, discuss with your business office if the form should be **assigned** to another employee or **submitted** to the EBO.
7. To assign the cart to another employee, click **Assign Cart** and then choose the employee who will review the cart; click **Assign**.

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8. You will see a verification that the cart was assigned.

**End of Instructions** if you clicked Assign Cart.

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9. After you click **Proceed to Checkout**, you may either:
   - Complete the account number (go to step **10**)
   - Let your business office enter the account number (go to step **12**).

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10. To enter the account number that will be charged, click the **Accounting Codes** tab.

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11. Complete the account number to be charged.

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12. Click **Submit Requisition**.
13. You will see a verification that the requisition was submitted.